PR TRACKING SYSTEM

User Manual

Table of Contents

Flowchart Program ***1***

Login System ***2***

Main Form ***2***

Setting View and Approve ***4***

Purchase Requisition ***5***

PR List ***9***

Review and Approved ***11***

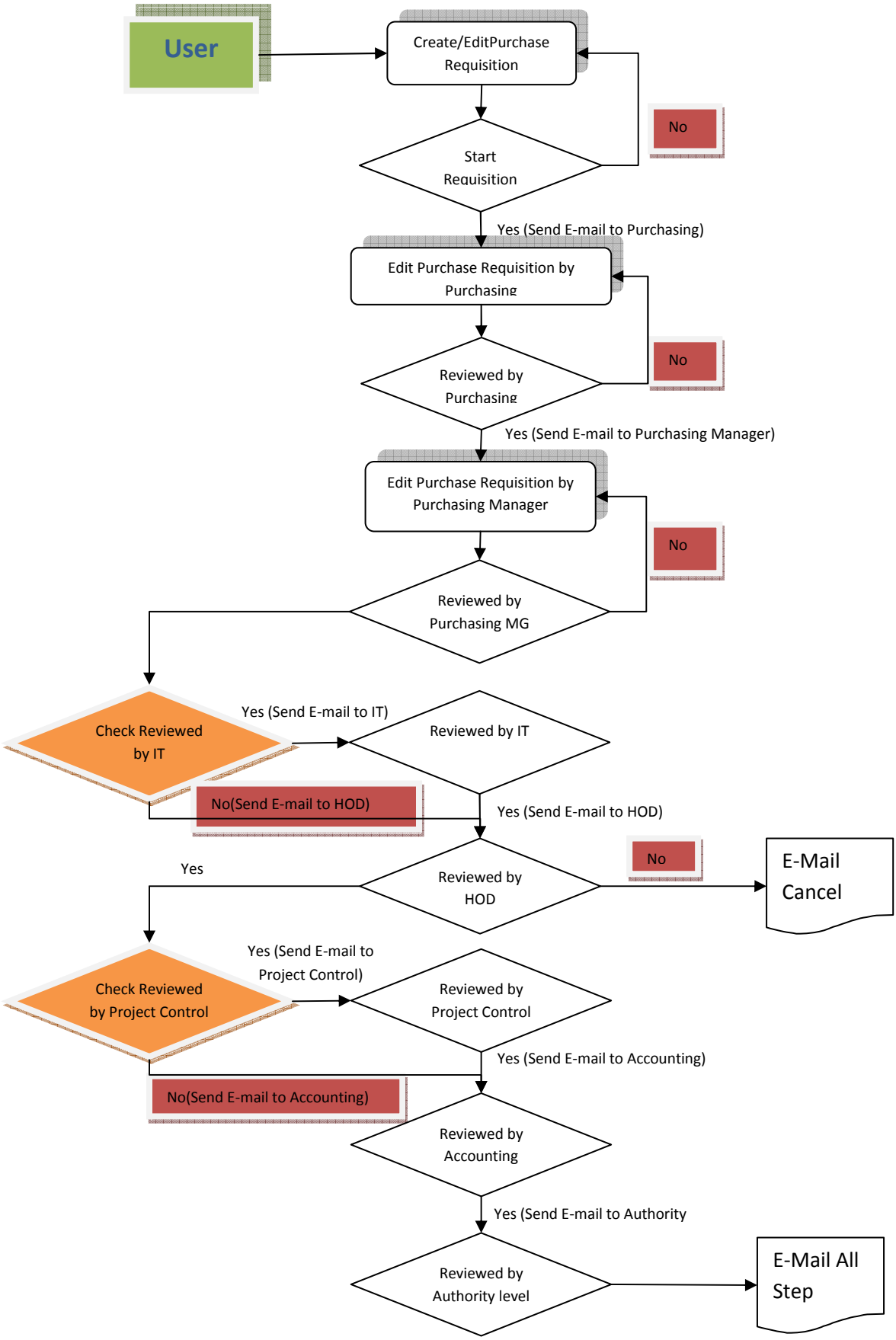
- ***For Review by Purchaser and Purchasing Manager*** 12
- ***For Review by IT*** 12
- ***For Review by Department Head (HOD)*** 12
- ***For Review by Project Control*** 13
- ***For Review by Accounting*** 13
- ***For Review by Authority Level*** 13

Part Purchasing Department

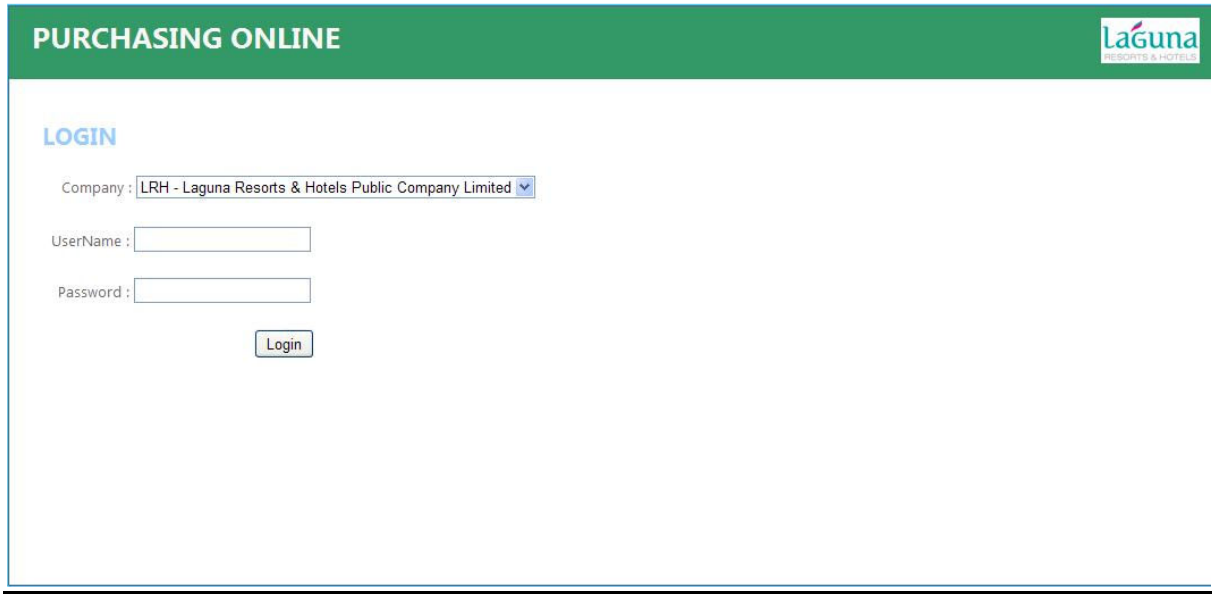
Edit PR Form in step ***(review by Purchasing and Purchasing manager)*** ***14***

- ***More functions to edit by Purchasing*** 15

Flowchart Program

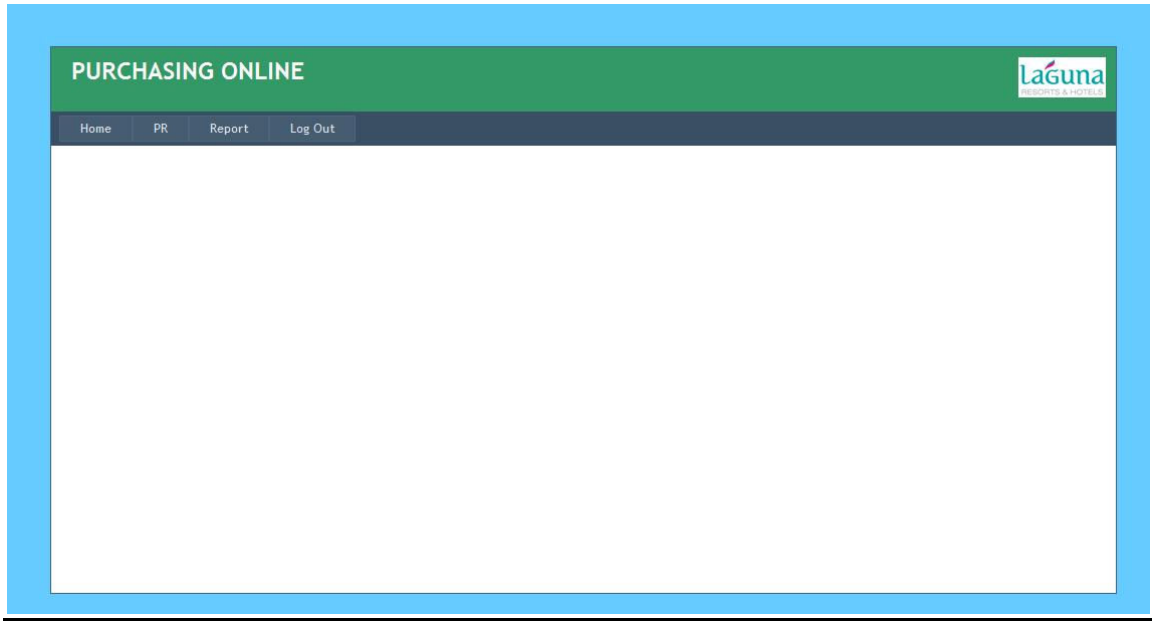


Login System



1. Go to http://www.lrh.co.th/pronline
2. Choose Company ,Entry UserName and Password (Same as Leave online or Business air ticket system)

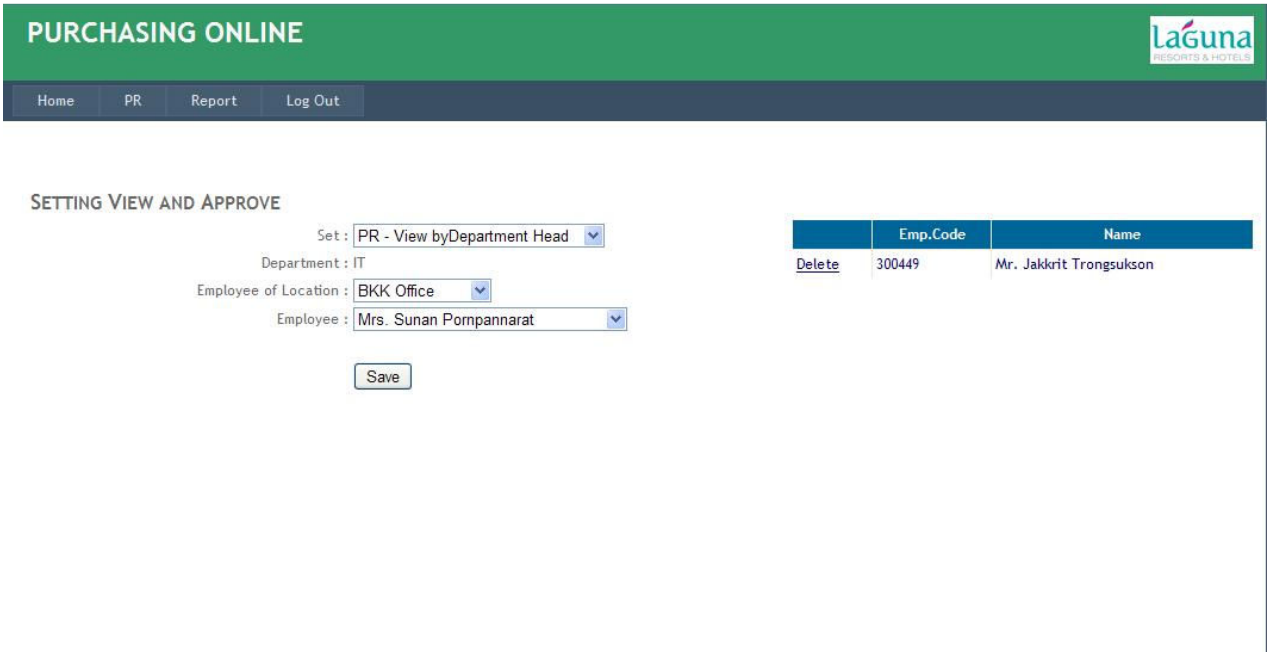
Main Form



PR menu

- **Purchase Requisition** — Create PR Form
- **PR List** — View status and Monitor PR Form
- **Review and Approved** — View PR Form and Approved Form (for Review and Authority level)
- **Setting View and Approve** — Initiator of each Department can set HOD name to review and Authority levelnameto approve
- **Setting PR** — Settinginformation about supplier, Item, Project and Config system(for admin and purchasing manager)
- **Purchasing Dept. Report** — Report for Purchasingdepartment (for purchasing dept.)

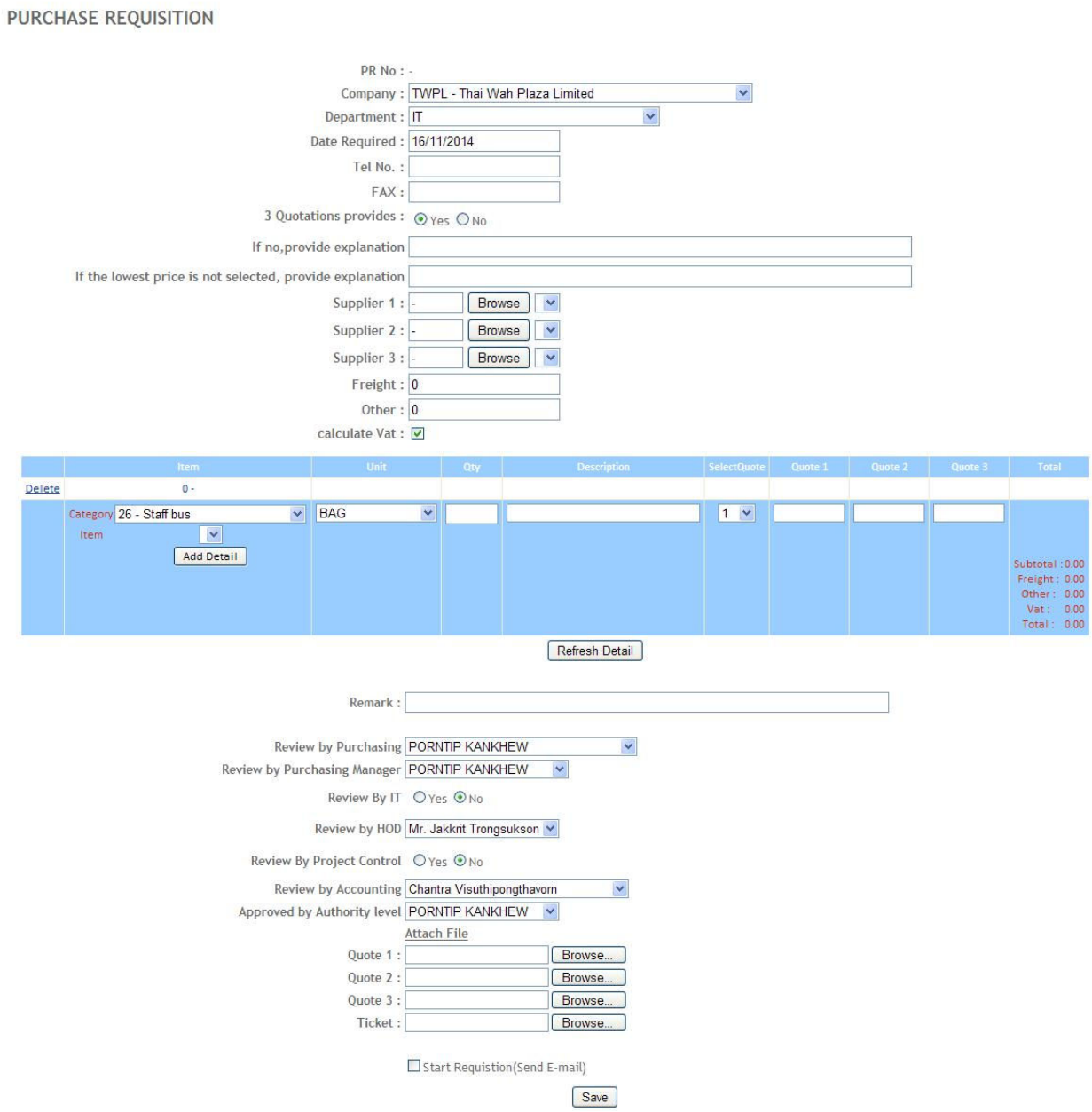
Setting View and Approve



	Title	Description
1	Set	Choose setting Review by HOD or Approved by Authority level of Department
2	Department	Show department of user login
3	Employee of location	Choose location of employeewho will be HOD or Authority level
4	Employee	Choose employee name for Review by HOD or Approved by Authority level of Department (Over rank 3)

1. On “Set” choose “PR – view by Department Head” or “PR – Approved by Authority Level” of Department.
2. On “ Employee location”. When you have chosenlocation employee, the system will show employee name of location on “Employee”
3. When you click button “Save”, the employee was set and show in the table on the right.

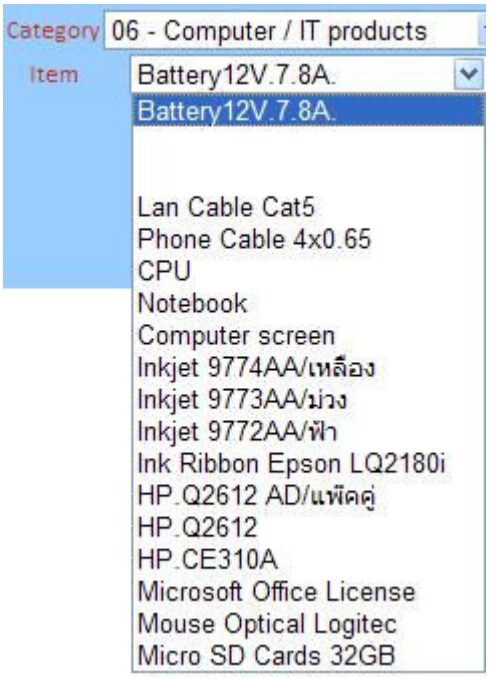
Purchase Requisition



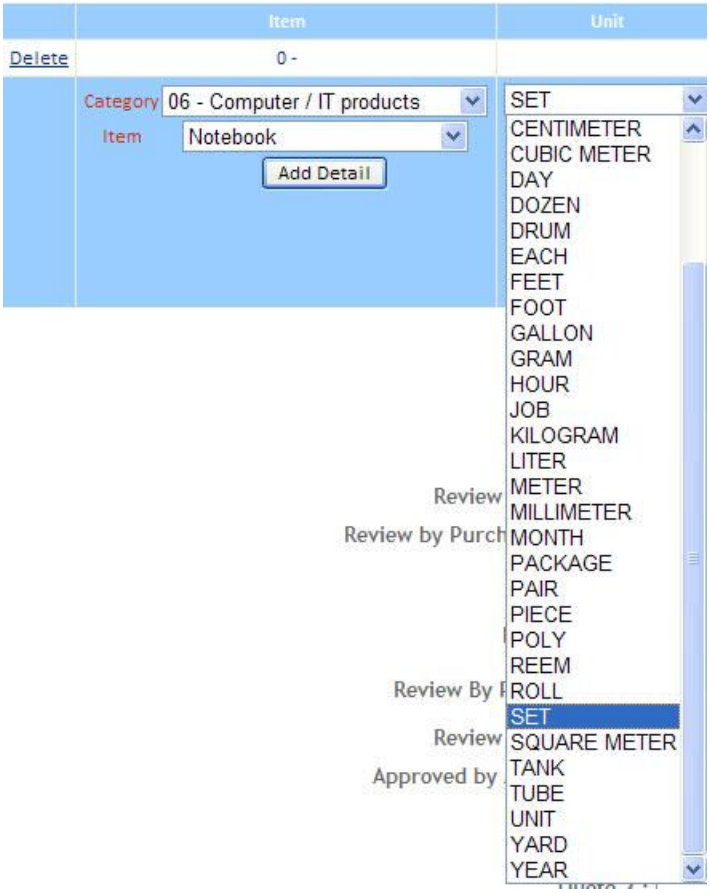
	Title	Description
1	PR No.	Number of document (System generate)
2	Company	Company of purchase requisition
3	Department	Department of purchase requisition
4	Date Required	Date that initiatorrequire item
5	Tel No.	Telephone of initiator
6	FAX	FAX of initiator
7	3 Quotations provides	Choose “Yes” or “No” for 3 Quotations provides
8	If no,provide explanation	Explanation for when you choose“NO” for 3 quotations provides
9	Supplier 1, Supplier 2, Supplier 3	Enter Supplier from Database (If don’t have supplier you require please inform purchasing Dept. to create.)
10	Freight	Freight of items
11	Other	Other charge for items
12	Calculate Vat	Mark for calculate vat (Default Mark)
13	Remark	Remark for purchase requisition
14	Review by Purchasing	Choose review by Purchasing
15	Review by Purchasing Manager	Choose review by Purchasing Manager
16	Review By IT	Choose Yes or No for review By IT. If you choose yes, the system will show textbox for enter the ticket number.
17	Review by HOD	Choose review by Department head (This will show after you set department head name in PR menu - **Setting View and Approve**)
18	Review By Project Control	Choose “Yes” or “No” for review By Project Control. If you choose yes, the system show project list to choose project. (If don’t have project name please inform purchasing dept. to create)
19	Review by Accounting	Choose review by Accounting
20	Approved by Authority level	Choose approved by Authority level (This will show after you set department head name in PR menu - **Setting View and Approve**)
21	Quote 1,2,3	Attached quotation of 3 supplier if you have
22	Ticket	Attached Ticket (with solution solve by IT) if you order for IT Asset

1. You enter information title No. 1-12.
2. When you enter information title No. 1-12, next step you add item that you want to order.

3. **Only for purchasing dept.**
   a. For adding the items, When you chosenCategory of items , the system will show item list of category.(Figure below)

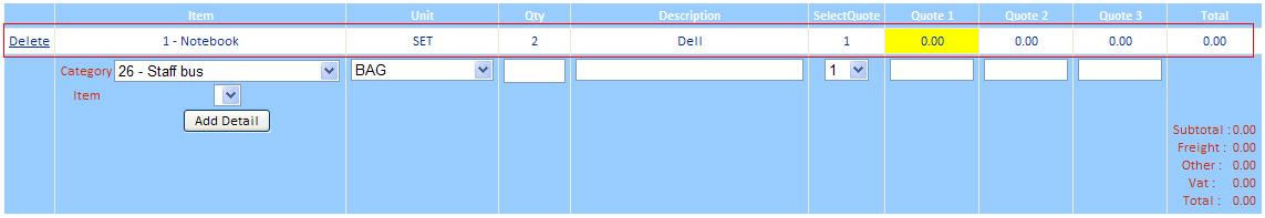


b. Next Step, Choose Unit of item.(Figure below)



4. Enter “Unit”, “Qty” and “Description”.
5. Choose “Select Quote” and fill in “Price” of each Item, If you don’t know, you can pass to nextstep.

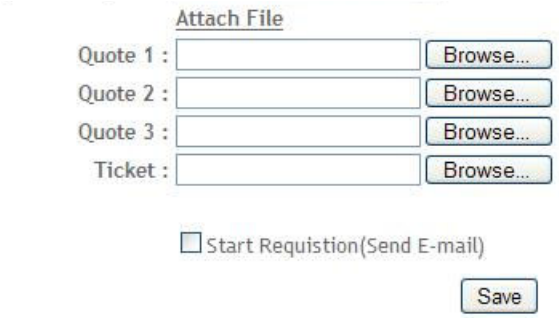
6. Click the "Add detail" button, after you have done the item that you order.



The item was added show in table (red border). ***You can add item order by step 3-6 again.***

7. Enter information title No.13-20.
8. Attached quotation and ticket (for IT item)

   a. Quotation on “Quote 1”, “Quote 2”, “Quote 3”



   b. For IT item order, Ticket with solved solution recommend by IT

9. On **“Start Requisition (Send E-mail)”**

   Mark - If you want tostart purchase requisition for approval process via email.

   Unmark - If you want this PR to be draft first, so you no need to start purchase requisitionyet.

10. Click "**Save**" button, every time when you have done to entry the Purchase Requisition.

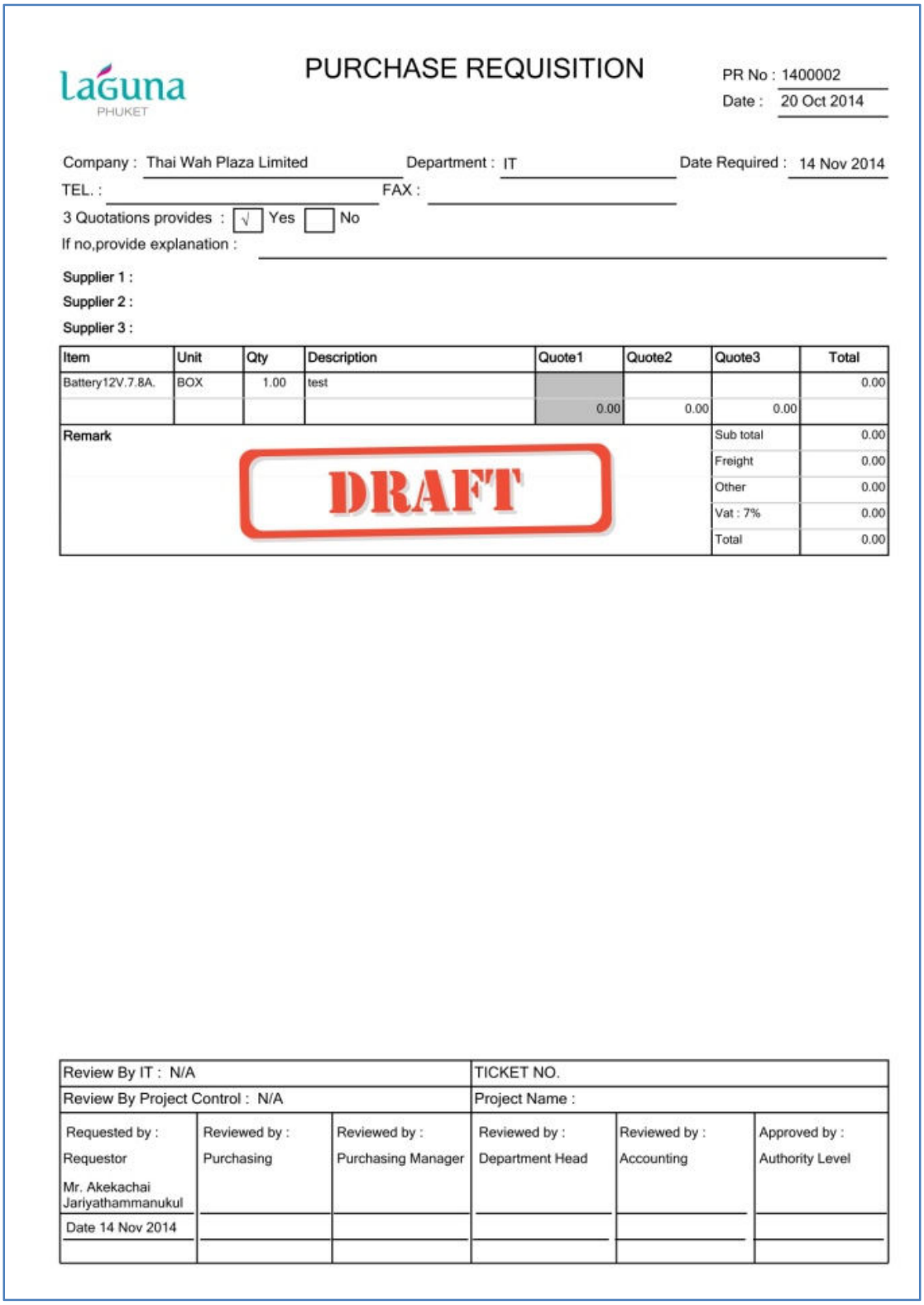
NOTE :When you have marked “start purchase requisition” and click “save”. The system will sent email for approval process. You will not be able to edit PR.

PR LIST

PURCHASING ONLINE
Home
PR
Report
Log Out
REQUISTION FORM LIST
Status Start
Year 2014
NO. Comp.Name Dept.Name View Purchasing Purchasing MGR IT Department Head Project Control Accounting Authority level Start Req.
1400002 Thai Wah Plaza Limited IT Click ! Pending Pending N/A Pending N/A Pending Pending

	Title	Description
1	Status	**Drafts** : Purchase requisition is on preparation and edit by initiator and do not start purchase requisition yet. **Start** : Purchase requisition is on process view/approve in each step. (Only purchasing dept. can edit for purchase review step) **Final** : Purchase requisition approved all step. (all users can not edit)
2	Year	Year of purchase requisition

When you click on ”Click”, the system show figure below.



Laguna PHUKET

PURCHASE REQUISITION

PR No : 1400002
Date : 20 Oct 2014

Company : Thai Wah Plaza Limited Department : IT Date Required : 14 Nov 2014
TEL. : FAX :
3 Quotations provides : √ Yes ☐ No
If no,provide explanation :

Supplier 1 :
Supplier 2 :
Supplier 3 :

Item	Unit	Qty	Description	Quote1	Quote2	Quote3	Total
Battery12V.7.8A.	BOX	1.00	test				0.00
				0.00	0.00	0.00	

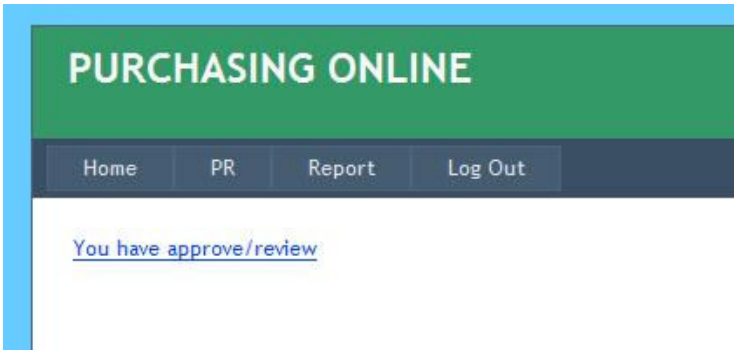
Remark		
DRAFT	Sub total	0.00
	Freight	0.00
	Other	0.00
	Vat : 7%	0.00
	Total	0.00

Review By IT : N/A			TICKET NO.		
Review By Project Control : N/A			Project Name :		
Requested by : Requestor Mr. Akekachai Jariyathammanukul	Reviewed by : Purchasing	Reviewed by : Purchasing Manager	Reviewed by : Department Head	Reviewed by : Accounting	Approved by : Authority Level
Date 14 Nov 2014					

Review and Approved

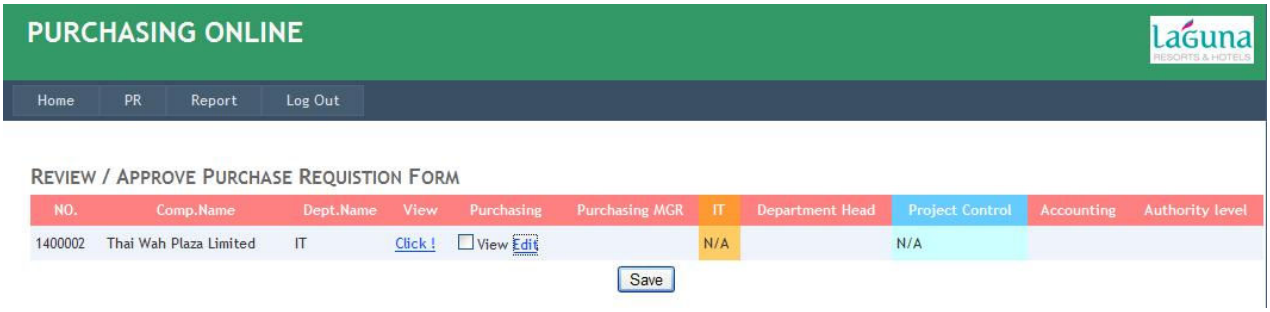
1. You can review and Approve by figure below.

   Case1When you have lists to review or approve, the system show link “You have approve/review”.



   Case2You click menu PR≫ Review and Approved.

2. Show page for review or approve. (figure below)



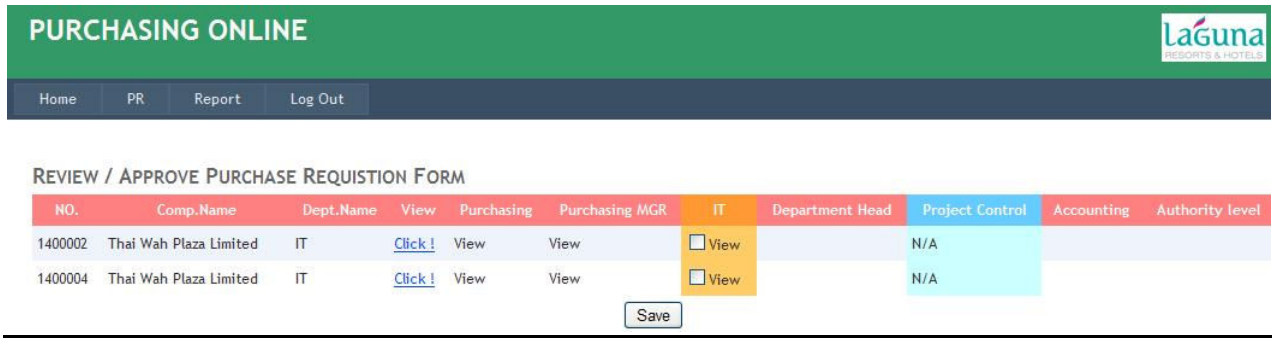
For Review by Purchasing and Purchasing Manager

The step that is reviewed bypurchasing and purchasing manager the systems allow to edit and review the purchase requisition form. (Figure below)

When you reviewed the PR form, you have marked checkbox“View” and click button “Save”. To finish step for review.(The system send email to the next reviewer)

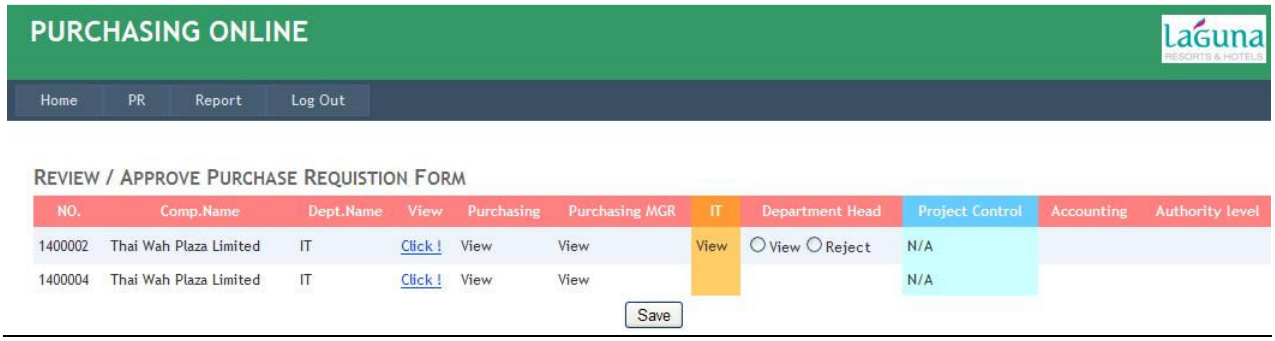
For Review by IT

In the Form that request review IT reviewing only, the system will bypass the HOD step



When you reviewed the PR form, you can mark oncheckbox“View” and click button “Save”to finish step for reviewing. (Thesystems send email to the next reviewer)

For Review by Department Head (HOD)

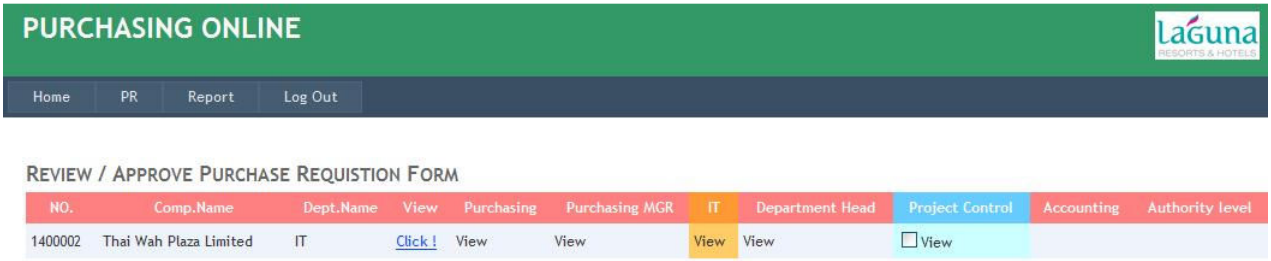


When you reviewed the PR form, you can mark on “View” or “Reject” and click button “Save”. To finish step for reviewing (The systems send email to the next reviewer)

*** Reject: Form status cancel and final step.

For Review by Project Control

For the item that underProject need Project Control reviewing and then pass to the Accounting reviewing step

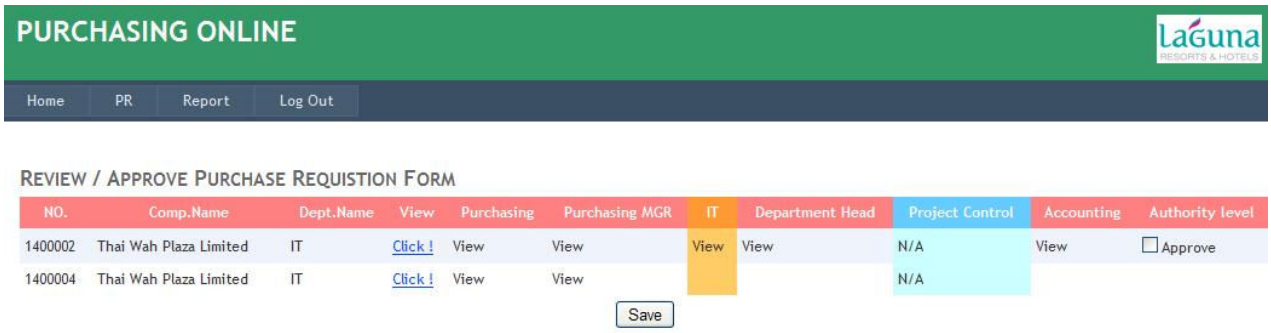


When you reviewed the PR form, you can mark on checkbox “View” and click button “Save”to finish step for reviewing. (The systems send email to the next reviewer)

For Review by Accounting

When you reviewed the PR form, you can mark on checkbox “View” and click button “Save”to finish step for reviewing. (The systems send email to the next reviewer)

For Approve by Authority Level



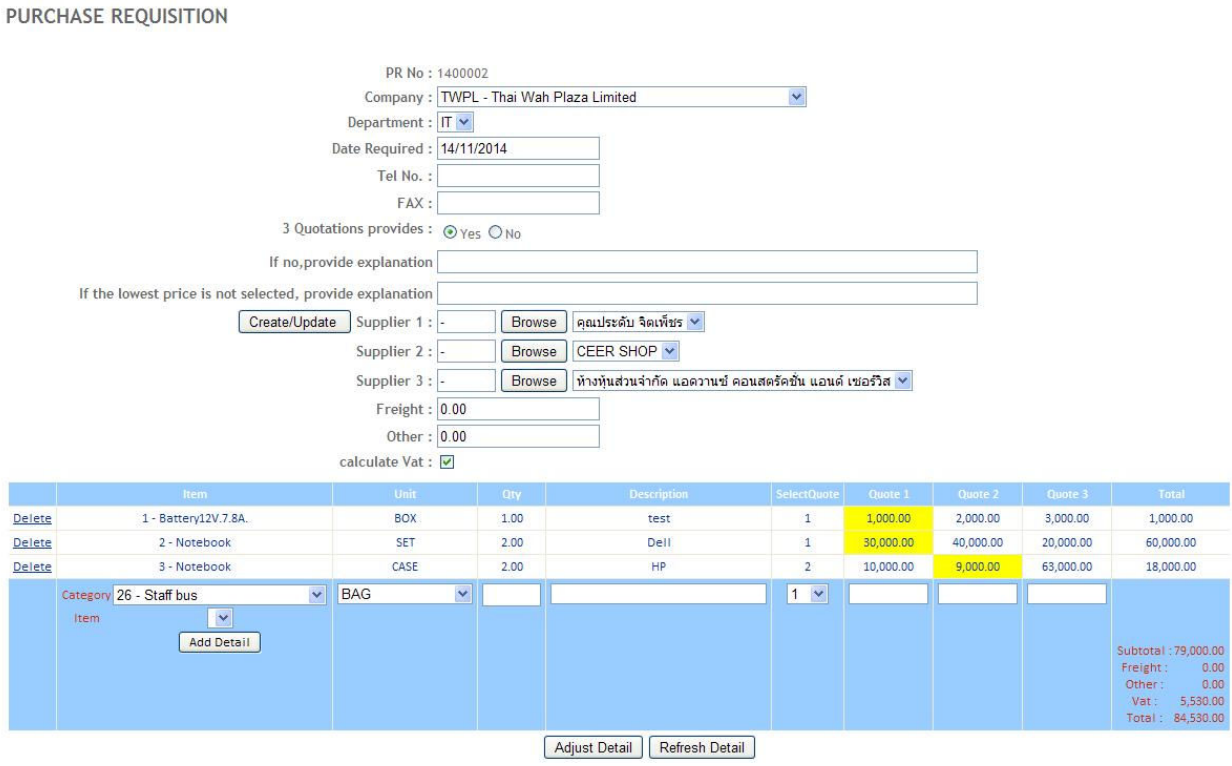
When you reviewed the PR form, you can mark on checkbox“Approve” and click button “Save”. to finish step for reviewing. (The systems send email to return all steps)

Part Purchasing Department

Edit PR Form in step (review by Purchasing and Purchasing manager)

The step for reviewing by purchaser and purchasing manager , the system allow to edit the purchase requisition form. (Figure below)

1. When you click link “Edit” of PR, the system show page form for editing PR Form.



2. The purchasing user can modify information as explain in the same step of initiator (How to use Purchase Requisition Page 6). You can add or delete item of PR Form.
3. When you updated PR Form, click button “Save”.The system willshow message “Save Complete PR NOxxxx”.

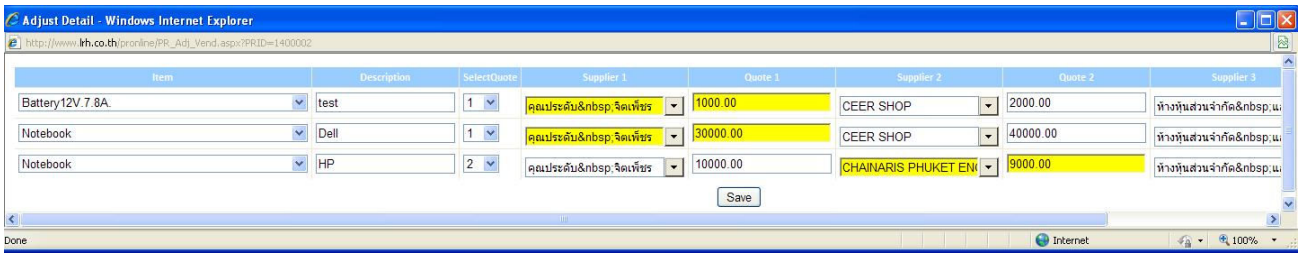
*** For Purchasing there are more functions to edit (Next pages)

More functions to edit by Purchasing

1. Create supplier from “Create/Update”

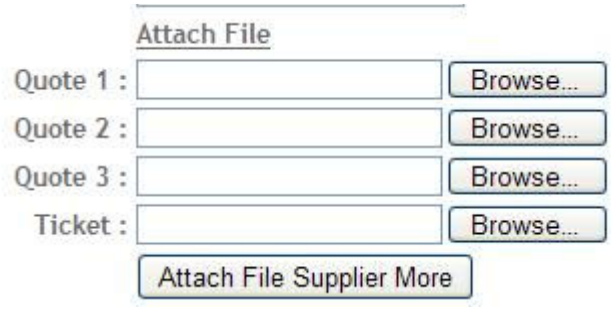
2. Button “Adjust Detail” for Adjust Detailitem, (Item code, Unit, Qty, Description,Select Quote, Price in each quote 1,2,3)

2.1 When you clicked button “Adjust Detail”,the system will show pop up windows for adjusting. (figure below)

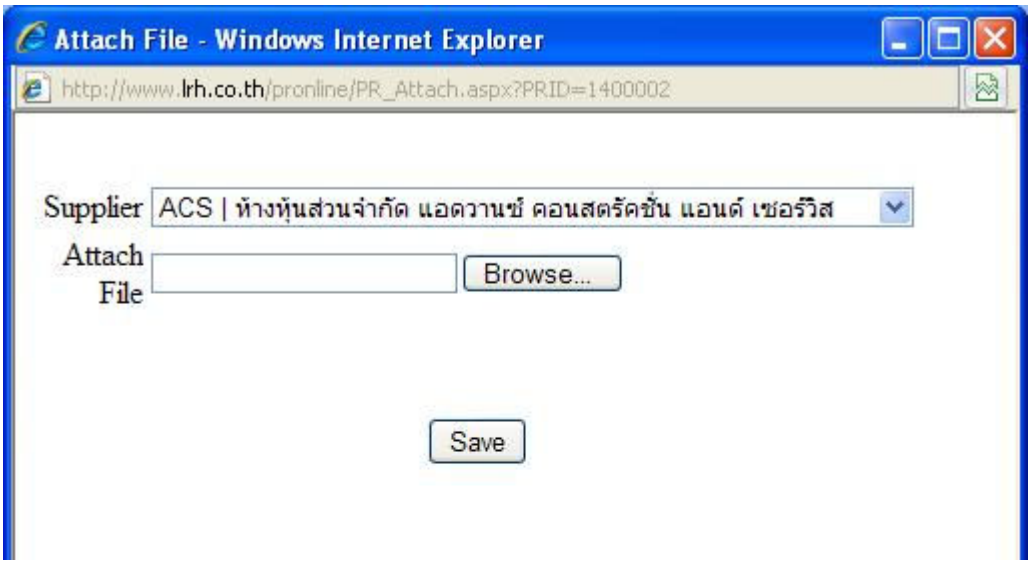


2.2 When you finish update details of items, please click button “Save”.The system willshow message “updated complete”.

3. If there are more than 3 supplier, you can click button “Attach File Supplier More” for attach file Supplier more.(figure below)



3.1 When you clicked button “Adjust Detail”,the system will show page for adjusting. (figure below)



3.2 Choose the supplier that you want to specify in PR and click "Browse" button to attach the documents

3.3 When you clicked button “Save”,the system willshow message and table.(figure below). You can view quotation by click on supplier name.